DOCUMENT RESUME

ED 055 635 LI 003 190

TITLE	Information and Referral Services: Interviewing and Information Giving; Working Draft.
INSTITUTION	American Rehabilitation Foundation, Minneapolis, Minn. Inst. for Interdisciplinary Studies.
SPONS AGENCY	Administration on Aging (DHEW), Washington, D.C.
PUB DATE	28 Feb 71
NOTE	37p.; (5 References)
EDRS PRICE	MF-$0.65 HC-$3.29
DESCRIPTORS	Community Services; Information Centers; Information Dissemination; *Information Needs; *Information Services; *Interviews; Manuals; *Older Adults; *Referral; Social Services

ABSTRACT

The specific purpose of interviewing in an information and referral (I & R) Center is to obtain whatever information is necessary about the person's problems in order to link him to the community provision most relevant to it. Chapter 1 in this manual discusses what is involved in interviewing and information-giving in an I & R Center. What takes place in an interview is covered in Chapter 2. Chapter 3 discusses record keeping. If records are properly kept, the basic I & R service can provide important statistical information about the kinds of problems older people have, the extent of their occurrence, plus valuable information about the ability of the community to meet these needs. Appended to this manual are: suggested reading, personal record card and tally sheet. (Other manuals in this series are available as LI 003187-003189 and LI 003191 through LI 003195). (Author/NH)

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Information and Referral Services:

INTERVIEWING AND INFORMATION GIVING

(Working Draft)

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Under a Title IV Grant

from the

U. S. DEPARTMENT OF HEALTH,
EDUCATION, AND WELFARE
Social and Rehabilitation Service
Administration on Aging

February 28, 1971

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Acknowledgements

We wish to acknowledge the contributions of persons who have had a major role in the development of this series of manuals. At the Institute for Interdisciplinary Studies, special consultant, Mrs. Shirley Zimmerman, deserves a very special thanks. Without her effort, the manuals would not exist. Mrs. Martha Cushing and Dr. Aaron Lowin also made significant contributions in the development of specific manuals. Professor Alfred J. Kahn's helpful guidance during the development of the manuals is also deeply appreciated. Other consultants who reviewed the manuals and made useful suggestions include Miss Marjorie Carpenter, Mrs. Corazon Doyle, Mr. Alfred Hirsch, Mr. Lester Fox, Mr. Jack Ossofsky and the National Council on the Aging, Dr. Etta Saloshin, Mrs. Virginia Stewart and Call For Action, and Mr. Douglas Thomas. We also wish to thank Mr. Gerald Bloedow, Executive Secretary of the Minnesota Governor's Citizens Council on Aging, for his time and help.

Finally, a very sincere debt of gratitude must be paid to the project secretarial staff, Mrs. Sharon Harrison, Mrs. Donna Rortvedt, and Miss Diane Weinke, for their patience and endurance in unscrambling and assembling the rough materials into readable form.

Nicholas Long, Ph.D.
Project Director
February 28, 1971

Chapter 1: What Goes Into Interviewing?

Definition and Purpose of Interviewing

All interviewing may be defined as a two way conversation for the purpose of giving and receiving information. The specific purpose of interviewing in an I & R center is to obtain whatever information is necessary about the person's problems in order to link him to the community provision most relevant to it.

People who seek information are not always sure about what they want to know, nor are they always sure what is really bothering them. In addition, it is difficult for many people to put their thoughts into words and to face their problems straight on. For older people particularly, this may be especially difficult, given the nature of some of their problems. This means that if you are going to fulfill the purpose of interviewing in an information and referral (I & R) center for the elderly, it is not enough to know what interviewing is, but also what is involved in it. What follows will try to deal with just this what is involved in interviewing and information-giving in an I & R center. In addition, it is recommended that you do some reading on your own for a deeper and fuller understanding of what is entailed in interviewing and information-giving, generally. (See Appendix for a list of suggested readings.)

Understanding People

How We Are All Alike

Basic to good interviewing is an understanding of human behavior. This will enable you to tune in and be sensitive to what people are saying and not saying. It is important to recognize that people are alike in very basic ways and different in significant other ways. We are all alike in our need for food, clothing, and shelter; our need for safety and security; our need to love and be loved; our need to be cared

for; our need to be recognized as persons in our own right; our need for self-esteem; and our need to find some meaning in life. These are needs common to all of us. Some people call them common human needs.

How We are All Different

While all of us have many of the same needs, we differ from one another in the degree or intensity with which each of us feels these needs. For example, it may be more important to some people to work among people they like than it is for others who consider salary and status more important. Similarly, it may be more important to some older people to live independently in their own households than it is for others who may not object to being cared for by their children or other relatives, and, in fact, feel somewhat relieved to be free of the responsibility for their own care. In between these extremes, of course, there are all degrees of shadings, depending on the person and the situation. This is why each interview is unique--no person is just the same as any other.

The Importance of Feelings

Also important to understanding human behavior is an awareness and understanding of the part that feelings play in each of our lives. Indeed, if you are really observant, you will find that feeling and emotion often seem to predominate over reason and logic in much of our everyday discourse and activities. We are all much more likely, for example, to accept suggestions or criticisms from someone we like and respect than from someone we don't. Often we will be spontaneously attracted to or repulsed by people we hardly know for reasons that may

be unknown to us. This is not to say that thought and reason do not count, or influence the way we feel; often a piece of information or new knowledge does help to change our feelings. It is to say, however, that neither we nor anyone else can rationally determine how we should feel. We feel the way we feel.

Feelings in Times of Upset and Change

Not only can we not determine or will our feelings, but feelings that we are able to control in normal circumstances can become more difficult to manage during times of change and upset. This is especially important to remember in interviewing at an I & R center. By its very nature, it is designed to serve people in changing or upsetting situations: people who may be suddenly faced with retirement; entry into a nursing home; giving up homes they had lived in all their married lives; death of a husband, wife, and/or other close relatives and friends. These are all significant events in a person's life, and particularly for the older person, who may tend to view time backwards in terms of his own death, these events may fill him with uncontrollable feelings of fear, grief, loneliness, being deserted, and of having "no way out."

The Mix of Feelings

In addition to the significant part that feelings play in each person's life, it is important to remember that feelings are often mixed and not of one kind. This is what is meant when we say a person is ambivalent or conflicted. He feels one way at one time and another way at another time. An older person may say he wants to be independent

and yet be demanding of other people's time, attention, and care. We may like a friend and yet not like certain things about him, or like him sometimes and not at other times. Most of us know about the close connection between love and hate and have experienced the pain and happiness involved in relationships that are especially meaningful to us. Similarly, we all know what it is to want to be recognized for our own individual selves and personal achievements, and yet still want to be a part of the lives of other people and connected to them in some way whether through friendships, church groups, professional or social organizations, or other kinds of groups and associations. That is the way it is with people. We often may not know which way we feel. We do and we don't, as the saying goes.

Learning to Know Yourself

In addition to an understanding of human behavior, another important part of interviewing is learning to know yourself. This means that you must take the time, effort, and pain to observe the way you act and feel in an interview situation. You must become aware of yourself in ways that perhaps you had not done before. How did you react, for example, when Mr. M. shouted at you in anger over the phone to say that he couldn't get along on his Social Security check? Did your heart start to pound, and did you begin to panic and offer apologies and excuses for reasons you were not quite sure about? Or did you quietly listen to Mr. M., understanding his anger, knowing that it was not directed at you personally? And then did you try to help him unravel his problem to find out how and if the center could help him?

How do you answer the phone when it rings? Do you sound hurried and rushed, even though this is why you are at the center--to answer the phone and talk to people? And what do you do when someone comes to the office when you are on the phone or maybe writing a report or taking care of the many other things you have to do? Do you let him know by a nod of the head, a smile, or some other gesture that you have seen him and will be with him in a moment? Or do you let him wait unnoticed until you are ready to talk to him?

How did you respond when Mrs. X didn't accept the information you gave her about other possible living arrangements she could make, after listening to her complain for so long and so bitterly about her daughter with whom she was now living? Did you become irritated and impatient and tell her what <u>you</u> thought would be best for her? What went through your mind and what did you say when Mr. D told you that the woman with whom he had lived for many years, but to whom he was not married, has left him and now he needed a housekeeper? Did you accept Mr. D's statement as a matter of fact, or did you try to pry further and pass judgment about his behavior? It is this kind of looking at yourself that is essential to develop the kind of self-discipline, objectivity, and sensitivity needed for your job of linking older people to the services they need, and also for making people feel comfortable in using the center.

<u>The Importance of Each Person</u>

Undergirding all interviewing, of course, is a commitment to people and to the notion of the dignity, worth, and importance of each individual person. If you are so committed, much of what goes into good interviewing

will come naturally. You will almost intuitively sense that what a person tells you about himself is not to be shared with others unless he gives you his permission to do so. You will almost intuitively respect his right to decide for himself what he wants to do, provided he is not harmful to himself or others, which means, of course, that you will not impose your views on him. You also will be attentive and responsive to what he says and asks and take his feelings into account with a smile, a word, a nod, or a pause to let him know that you hear his pain, his anger, his grief, his happiness without probing into his feelings or necessarily dealing with them directly. Personal counseling, after all, is not the business of an I & R center. It is the I & R center's business to link people to the services they need, not to duplicate the services of other agencies. The important point is that if you truly believe people are important and that each person is uniquely important this will come through in:

. the attentiveness with which you listen

. the sensitivity with which you ask questions

. the respect with which you treat confidences

. the restraint you use in imposing your views on others

. the care you take to avoid disappointments and uneasiness based on glib and ill-founded statements and promises.

Conviction about the importance of each and every person coupled with an understanding of human behavior, self-knowledge, and knowledge about community resources should go a long way toward helping you conduct a good interview and enabling you to link people to services they need.

Chapter 2: What Takes Place in an Interview

At the Beginning

Discomfort

As you gain experience in interviewing, you will probably notice that people often are uneasy and unsure of themselves, especially at the beginning of an interview. Not only may many people contacting the center be experiencing significant changes in their lives which they find uncomfortable to admit, but they also do not know you. Many have never gone outside their own family or circle of friends to find solutions to their problems. Some may not be sure whether they are too poor or too well off to be using the center. And then, of course, some may dislike the idea of using a resource that is labeled "for the elderly." Part of the discomfort is related to the mix of feelings that was discussed earlier.

Putting Fears to Rest

This means that at the beginning of an interview you may have to spend a considerable amount of time putting fears and apprehensions to rest if you are to be able to get to the business of providing information to people about services and resources they want or need. In all phases of interviewing, the warmth of your voice, the words you use, and the interest you convey are important. This is especially true at the beginning, because everything else has to follow. In some cases, you will probably have to explain the purpose of the center, what it is set up to do, and who it is for. Give the person a chance to ask questions and make comments, and give him time to collect his thoughts. Do not rush him.

In order to avoid misunderstandings, you may also have to clarify what the center cannot do. It cannot counsel on personal problems; it cannot provide medical services; it cannot provide financial assistance or determine eligibility for it; nor can it provide homemaker or transportation service. You can go on to further explain what it can do--it can provide entry or access to these services and one of the mechanisms for doing so is information-giving. Then, perhaps you can explain that this is what you are now prepared to do.

Information-Giving. A Few General Comments

Information-giving is part of the interactional process of interviewing. The same general principles apply for information-giving as for interviewing. The same personal qualities needed for interviewing are also needed for information-giving. It is all part of the same package. Nonetheless, a few general comments about information-giving specifically may be useful within the context of the present discussion.

Knowing Enough About the Person's Problem

Because the purpose of the I & R center is to link the elderly to whatever community resources, provisions, services, or facilities they need, you will have to know enough about the person's problem to know which of these services is most relevant to it. You already learned in conducting the community resource survey that there are a number of provisions in the community for older people, but that each has its own set of rules and objectives under which it operates. This means that you must learn enough about the person's problem to know not only which resource is most likely to be of help to him, but under what circumstances.

Therefore, when a person calls and says that he cannot make ends meet, you will have to help him describe his problem in greater detail in order for you to know what provision you should tell him about. Does he mean that he cannot pay his rent and goes without food month after month, or does he mean that since his retirement he has had to cut back on his former standard of living and can no longer afford to pay for items such as magazines and organizational membership dues? Once you have determined the specific nature of his problem, you may want to probe further to see if he is receiving or might be entitled to receive a monthly cash payment from any one of a number of income-granting sources or if he might be interested in post-retirement counseling.

Take another example. When a middle-aged daughter calls to say that she can no longer manage the constant care of her bedridden mother and has to have help, what is she saying exactly besides conveying the impression that she is tired and maybe resentful about being burdened with the care of her mother. What kind of help is she thinking about? Is she thinking about nursing home care for her mother, visiting nurse services, or home-maker services? Indeed, she may not know that these various community provisions exist. Or might she want to talk with someone about her feelings regarding the responsibility her mother's illness has imposed upon her? Information from the resource file will be helpful to her in locating the resource best suited to her and her mother's needs, providing you know what she is really asking for.

A Person's Right Not to Tell You Everything

In attempting to accurately identify the person's problems in order to locate the resource most relevant to it, it is always best to accept

the person's statement of his problem at face value, even though you may suspect that he is not telling you the whole story. To do otherwise would be to infringe on his privacy and right to decide for himself what he wants to tell you in relation to the kind of help he wants. Probing is the province of the agencies, not the I & R center.

Knowing the Resource File

Just a word about the resource file in information-giving. The more familiar you are with it, the more efficient you will be in exploring with the person what you need to know in order to find the provision or provisions most relevant to his problem. This is very important. The other side of the coin, of course, is that it is almost impossible to list or to second guess all the questions that you will need to ask in order to provide a given person the information he needs about any given resource. The service you provide literally depends on your knowledge of community resources and your ability to use the resource file efficiently. This cannot be emphasized enough.

Letting People Tell You in Their Own Way: Good Listening Pays Off

As you gain experience in information-giving, you will find that people often will provide information that you need without your having to ask for it. They will simply tell you in their own way what you need to know with only an occasional question from you to help clarify what they are saying. This is where good listening pays off. It saves the person who is seeking help from unnecessary questioning and facilitates the skill with which you do your job.

Giving Information that is Useful and Relevant to the Person

In addition to learning enough about the person's problem to enable you to provide him with information about a particular community resource, it is also important to keep in mind that you should provide the person with only that information about the resource that is useful and relevant to him. In other words, if a person calls with what seems to be a health problem, it is not necessary or even helpful, after exploring the problem in greater detail with him and then telling him about a health clinic in his neighborhood, to also tell him about the difficulties the clinic has had with its advisory committee or medical director. All he needs and probably wants to know is where he can go to get the medical attention he needs. Additional, irrelevant information may only confuse or frighten him. If the clinic near his home can provide the service, that is all that he needs to know. The rest is just so much conversation that benefits no one.

Making Sure People Understand

Again, as you gain experience in information-giving and interviewing, you may sometimes find that you are not getting your point across to the person with whom you are talking. This may occur for a number of reasons. The information may be new to him. Some of it may be complicated. He may be preoccupied or disturbed about something and not really be listening to you. He could easily be hard-of-hearing, yet embarrassed to tell you. Perhaps he cannot understand English well or there may be too much noise in the room or static on the phone. Whatever the case, it is important for you to find ways to help the person understand what you are trying to tell him.

Sometimes you may have to rephrase your words, finding words that ring a bell or have meaning to a particular person. If you suspect that the person is hard-of-hearing, you may have to take special pains to speak slowly, distinctly, and directly to him or into the phone. However, if the person is so hard-of-hearing that you are unable to communicate with him, even after taking these measures, you may have to write or print what you want to say to him in a face-to-face interview. If the center is to fulfill its mission of linking people to services, it is not enough simply to give information. You must be sure that people also understand it.

When People Get Angry

You should also be able to deal with anger, frustration, and annoyance when you encounter them. These are common reactions which you are likely to meet. Often you will not be at fault, but sometimes you may be. When you are not at fault, it is important for you to listen to the person to hear what he is saying. Sometimes he may not have understood what you told him, or he may have been mistaken about a particular agency's policy. Maybe he was rebuffed; perhaps he is in a mood or is always difficult. Whatever the reason, he is unhappy. If the error was yours, the only thing you can do is acknowledge it and try to correct it. If the error was his, the only thing you can do is to explain and help him correct his mistake, but in a way that does not embarrass or degrade him. If the problem seems to rest with another agency, either because of its policy or the person offering the service, you may want to consider twice before taking sides at that particular

moment. You should certainly take the opportunity to explore the validity of the inquirer's anger and complaint. The important point is that you will have to deal with anger, annoyance, and frustration as part of your daily job. This can be emotiona ly exhausting. You should be prepared to meet such encounters armed with an understanding of human behavior and knowledge about how such situations affect you. This will help to lessen the strain that these kinds of situations impose upon you.

Ending the Interview

Like all interviews, the interview in an I & R center comes to an end when the purpose of the interview has been fulfilled for both parties. This is when you have explored the details of a person's problem fully enough to be able to provide him with the information he needs about the community provision most relevant to his problem. When the purpose of an interview has been fulfilled, it is time for you to go on to attend to other people. With some older people, this may not be easy. A tactful comment to let the person know you were happy to be of help, if you were helpful, or if you were not, a similar comment indicating that you were sorry you could not be more helpful, should be sufficient to indicate that the interview is over. You will find other ways to bring an interview to a close as you gain more experience.

Chapter 3: Keeping Records

Completing the Personal-Record Card

Following each interview, complete the personal-record card as instructed. The card has been designed to include all components of the complete service (see Appendix B). It should be self-explanatory. You will note that in cases of simple information-giving, it will not be necessary to obtain identifying information about the person for office records. You should routinely note the person's phone number in the designated space, however. This should be one of the first questions you ask so that you can return his call in case the line is disconnected. Then check the subject of the inquiry as specified, and follow it with brief descriptive details about the inquiry or problem. For example, if the person's problem was financial, a brief detailed description of his problem might be that his Old Age Assistance check was late. The next item pertains to the resource people the person already has or has had available to him to help him deal with his problem, such as a doctor, lawyer, social worker, realtor, or clergyman. It is very important that this item be checked out when and where it is pertinent in order to avoid duplicated effort and later embarrassment. The next item deals with identifying information about the person which may be necessary for particular kinds of community services, particularly those offered by some private agencies, churches, or some volunteer groups. Again, the resource file should give you clues as to what kind of information you need to obtain to link the person to the service that can be most helpful to him. Also note in the space provided whether a provider of the service

was found or not found, fully or in part, and what action was taken on the case if the additional components of referral, follow-up, and advocacy are added to the center's service. If these additional components are added, be sure to tag the cards in some visible way, particularly for follow-up, so that you have an easy reminder of what you have to do and when you have to do it. This will be discussed later under follow-up procedures.

Tally Sheet

After you have completed the personal-record form for each person contacting the center on a particular day, tally the daily activity for each case on the daily tally sheet provided (see Appendix C). If a case, which is one contact, seems to present two problems, both should be included in your count in the appropriate spaces. You will notice that the tally sheet provides space for a full week's activity. The tally sheet should be filled out in duplicate (or copied), one to send on to the state AoA office for planning purposes. The other should be kept in its own file in the I & R center for community reporting. File the personal-record cards in their own file drawer alphabetically. Much of this record keeping can be done by volunteers once you have shown them how to do it. If the center goes on to provide referral and follow-up services, the information on these cards will be indispensible to these additional services. If the center does not go on to provide referral and follow-up services, however, throw the cards away after a month or so to make room for newer records.

Record-keeping is an important part of your job and must be done. It can provide later payoffs to older people as state and Federal

agencies begin to get a better idea of what resources are available to meet the needs of older people and where they are located across the country. This is part of the planning function of the I & R service. Later as the center network develops more fully, the state and Federal Administration on Aging offices may ask you to gather other data important to the planning and provision of services for older people.

Chapter 4: Conclusion

This, in essence, concludes the basic minimum linkage service of any I & R center. By itself, information-giving can be very important. It will certainly help make many older people in your community more aware of the services and provisions available to them and it can go a long way toward making the lives of older people healthier and happier. In addition, if records are properly kept, the basic I & R service can provide important statistical information about the kinds of problems that older people have, the extent of their occurrence, plus valuable information about the ability of the community to meet these needs. This, in fact, is what an I & R center is all about. It is a two-way street going from the community to the individual and from the individual to the community. It is an access point and an entry way to a large and complicated service network that is designed to help people in its own cumbersome way.

In some communities the basic information service of the I & R center may seem sufficient; in others, more may be wanted and expected in which case, referral, follow-up, and advocacy can be added one by one as you and the center grow in experience and knowledge. In the next sections procedures for referral, follow-up, and advocacy will be described for those who can and want to add them to the basic work they have already begun in providing a linkage between older people and the services they need.

Appendix A

SUGGESTED READINGS

DeSchweinitz, Elizabeth and DeSchweinitz, Karl, Interviewing In Social Security, Washington, D.C.: Department of Health, Education and Welfare, 1961, p. 56.

Garrett, Annette, Interviewing: Its Principles and Methods, New York: Family Services Association of America, 1942, pp. 7-59.

Kahn, Alfred, et. al., Neighborhood Information Centers: A Study and Some Proposals, New York: Columbia University School of Social Work, 1966, pp. 108-119.

Mahoney, Stanley C., The Art of Helping People Effectively, New York: Association Press, 1967, p. 156.

Towle, Charlotte, Common Human Needs (Rev. Ed.), New York: Association of Social Workers, 1965.

File alphabetically

Appendix B

PERSONAL RECORD CARD

Person's Name_____ Date_____

Person's Phone Number_____ Worker_____

When Home_____

Previous Contact with Center_____

Subject of Inquiry:

Financial_____	Home-helps _____	Personal-Social_____
Housing _____	Legal _____	Transportation _____
Health _____	Leisure-time_____	Miscellaneous _____

Specific nature of inquiry: (Give brief details)

_____

_____

_____

Depending on nature of inquiry, determine person's previous or present contact with:

Doctor _____	Name_____	Phone number_____
Social agency_____	Name_____Worker's name_____	Phone number_____
Attorney _____	Name_____	Phone number_____
Realtor _____	Name_____	Phone number_____
Clergyman _____	Name_____	Phone number_____
Other _____	Name_____	Phone number_____

If pertinent, ask the following:

Income Status_____ Welfare Status_____

Address_____ Age_____

Neighborhood or suburb_____

Race_____Religion_____Ethnic group_____

Social Security status_____

Action taken: Information _____ Referral _____ Follow-up _____ Advocacy_____

Service not found _____ Service found _____ Fully _____ Partially _____

Give brief details of action taken including specific agency or agencies toward which action was directed.

_____

_____

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Total	
	*I	**SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF
Total number of calls or inquiries received																
Total 1st calls																
Total 2nd calls																
Total more than 2 calls																
Total number of calls or inquires by person																
Total number inquires by relative																
Total number inquires by professional																
Total number of times was action taken																
Information-giving																
Referral																
Follow-up																
Advocacy																

* I = inquiry
**SNF = services not found

TALLY SHEET - FINANCIAL

Date _____

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Total	
	*I	**SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF
FINANCIAL																
Financial Assistance																
Emergency																
Monthly cash grants																
Material Assistance																
Food Stamps																
Food Commodities																
Other																
Financial Insurance																
Social Insurance																
Private Insurance																
Union Pensions/Benefits																
Other																
Housing Assistance																
Rent Subsidies																
Mortgage Subsidies																
Home Improvement Loans																
Home Relocation Loans																
Other																

Tally Sheet
Financial

Date _____

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday			
	*I	**SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF		SNF
FINANCIAL																
Financial Assistance																
Emergency																
Monthly cash grants																
Material Assistance																
Food Stamps																
Food Commodities																
Other																
Financial Insurance																
Social Insurance																
Private Insurance																
Union Pensions/Benefits																
Other																
Housing Assistance																
Rent Subsidies																
Mortgage Subsidies																
Home Improvement Loans																
Home Relocation Loans																
Other																

25

* I = inquiry
**SNF = services not found

Tally Sheet
Financial (continued)

Date _____

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Total	
	*I	**SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF
Medical Assistance --payment for medical services																
Private Medical Insurance																
Financial aid																
Medicaid																
Medicare																
Other																
Employment																
Job information																
Job counseling																
Job finding																
Job referral																
Part-time employment opportunities																
Other																

Tally Sheet
Housing

Date _____

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Total	
	*I	**SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF
HOUSING																
Residential housing arrangements/ services																
Emergency housing																
Boarding home care																
Nursing home/long term convalescent care																
Retirement housing																
Low-rent housing																
Other																
Housing-related services																
Rental assistance (finding an apt.)																
Home purchasing and selling																
Financial service																
Low cost home loans																
Mortgages																
Mortgage subsidies																
Home- relocation loans																
Insurance																
Neat subsidy																
Legal services																
Housing information/referral services																

* I = inquiry
**SNF = services not found

Tally Sheet
Housing (continued)

Date _____

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Total	
	*I	**SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF
Other																
Community housing regulation services																
Standard setting and licensing																
Zoning																
Housing code enforcement																
Other																

* I = inquiry
**SNF = service not found

Tally Sheet
Health

Date _____

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday	
	*I	**SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF
HEALTH (general and mental health)														
Community health services														
Communicable disease control														
Community health supervision/ education programs														
Food, water and housing inspection														
Other														
Home-health services														
Visiting nurse services														
Physicians home visits														
Prescription deliveries														
Homemaker service														
Shopping service														
Housekeeping services														
Oldster sitting														
Companion services														
Other														
Community health care														
Emergency services														
Drugs														
Dental														

* I = inquiry
**SNF = services not found

Tally Sheet
Health (continued)

Date _____

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Total	
	*I	**SNF	I	SNF	I	SNF	I	S	I	S	I	SNF	I	SNF	I	F
Day care																
Individual and family counseling																
Group therapy																
Psychological diagnosis and testing																
Ear, eye, nose, throat exams/treatment																
Physical exams																
Other																
In-patient health care (acute & chronic)																
Emergency service																
24 hour nursing & boarding care																
Supportive services																
Financial																
Medicaid																
Medicare																
Volunteer contributions																
Other																
Prosthetics																
Health Information & referral services																
Services for chronic conditions																
Alcoholism																

* I = inquiry
**SNF = services not found

Tally Sheet
Health (continued)

Date _____

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Total	
	*I	**SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF
Blindness																
Arthritis																
Cancer																
Deafness																
Diabetes																
Heart																
Stroke																
Other																
Death-related services																
Death certificates																
Funeral services																
Wills																
Autopsies																
Religious counseling																
Individual and family counseling																
Other																

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* I = inquiry
**SNF = services not found

Tally Sheet
Legal

Date _____

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Daily Total	
	*I	**SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF
LEGAL														
Consumer Protection														
Protective services														
Commitment														
Guardianship														
General legal														
Mortgages														
Wills														
Divorce														
Legal information & referral services														
Other														

* I = inquiry
** SNF = services not found

Tally Sheet
Transportation

Date _____

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		
	*I	**SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	
TRANSPORTATION															
Ambulance															
Taxi service															
Public transportation															
Special transportation services															
Other															

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* I = ...ity
**SNF = ... not found

Tally Sheet
Home Help

Date _____

HOME H...	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Total	
	*I	**SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF
...ker service																
Shopping service																
...eals on wheels																
Housekeeping service																
Companion & sitting service																
Friendly visiting service																
Visiting nurse service																
Other																

* I = inquiry
**SNF = services not found

Tally Sheet
Leisure Time Activities

LEISURE TIME ACTIVITIES	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Total	
	*I	**SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF
Adult education programs																
Special interest activities																
Social activities																
Cultural programs																
Volunteer activities																
Travel																
Recreation																
Other																

* I = inquiry
**SNF = services not found

Tally Sheet
Personal Social Services

Date _____

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Total	
	*I	**SNT	I	SNT	I	SNT	I	SNT	I	SNT	I	SNT	I	SNT	I	SNT
PERSONAL SOCIAL SERVICES																
Individual & family counseling																
Group therapy																
Psychological testing, diagnosis & evaluation																
Day care programs																
Various leisure time activities																
Information & referral services on personal and social problems																
Residential nursing care under non-medical auspices																
Volunteer services																
Vocational counseling																
Other																

* I = inquiry

Tally Sheet
Miscellaneous

Date _____

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday			
	*I	**SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF	I	SNF
MISCELLANEOUS																
Taxes																
Real estate																
Income: federal, state & local																
Auto																
Emergencies																
Police protection																
Fire protection																
Health																
Social																
General Information Referral Services																
OTHER																

* I = inquiry
**SNF = services not found